

## **American International Relations: Lessons from Dollar Diplomacy and Caribbean Development**

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### **Abstract**

The United States sprung onto the world stage at the turn of the twentieth century, joining the ranks of the European imperial powers. Two events catalyzed this evolution, both occurring in the Caribbean. The outcome of the Spanish-American War proved the first, with direct possession of Puerto Rico and other territories, as well as virtual control over Cuba as a protectorate. Soon thereafter, primarily associated with President William Howard Taft, Dollar Diplomacy provided a vehicle for U.S. sovereignty over the Dominican Republic and other areas of the Caribbean, substituting “dollars for bullets.” The U.S. projected its power into these arenas, seeking to reshape and develop regional Latin American polities into capitalistic, democratic nations in the American image. This laboratory, experimenting with power and economic development, would forge new American foreign policy directions, its echoes today shaping contemporary nation-building projects in places like Iraq and Afghanistan.

### **Biography**

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*"Peace follows . . . the power of the mighty civilized races which have not lost the fighting instinct, and which by their expansion are gradually bringing peace into red wastes where the barbarian peoples of the world hold sway."*

**Theodore Roosevelt (1899)<sup>1</sup>**

The lure of new global export markets, among other factors, drove the United States to seize the opportunity of the *Maine's* sinking in Havana harbor, thrusting America into the ranks of imperial nations. Republican Senator Albert J. Beveridge defended American imperial-

ism as right and just in his Senate speech of January 9, 1900. According to Beveridge, God made Americans politically adept so "that we may administer government among savage and senile peoples."<sup>2</sup> To prevent relapse into barbarism, then, Americans had been given a divine mission to "lead in the regeneration of the world."<sup>3</sup>

Theodore Roosevelt concurred. The president-scholar perceived a "certain parallelism" regarding the fate of species and the affairs of men, i.e., development, change and dominance among those various human groups "which form races or nations." A barbaric race might gradually develop into a more complex civilization, just as in evolutionary biology generalized forms give rise to specialized forms. Roosevelt perceived the question of how to deal with utterly alien peoples as the daunting challenge then facing empires in the new century. International duty, according to the great powers, demanded control of other races—while, of course, safeguarding against the threat of barbarism—but only if managed "for the benefit of the other race."<sup>4</sup>

Roosevelt and Beveridge, in a nutshell, expressed the turn-of-the-century civilizing mission embraced by the United States as the ebb and flow of international fortune presented the United States with a global empire, one anchored in the Caribbean. Indeed, the pervasive appeal of such notions transcended political and popular ideas of international development and peace, with *Scientific American* even noting Puerto Rico as unique, possessing "a large white population capable



Col. Theodore Roosevelt, commander of the 1898 "Rough Riders" cavalry at the time of the Spanish-American War.

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of taking part in advancing civilization.”<sup>5</sup>

### **New Economic Frontiers**

Economic considerations conjoined with the civilizing impetus to evolve new directions in American international relations. During the nineteenth century the United States had witnessed Europeans carving up the world, the British, the French and the Germans in Africa, the French also in Indochina, and later the

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Japanese even expanding their power in Asia, with virtually all nations scrambling for a piece of China. The United States had catalyzed the emergence of the ultimately imperialist Meiji regime with Commodore Matthew C. Perry’s mid-century, trade-oriented gunboat diplomacy; however, to project sustained power, Americans sought to expand their navy. After the Confederate War, Secretary of State William Seward had pursued expansion of an American Pacific presence with the purchase of Alaska, and also argued unsuccessfully for U.S. naval bases in the

Caribbean. In the 1890s, U.S. Naval College president Captain Alfred Thayer Mahan succeeded where Seward had failed. Mahan argued that British global dominance emerged from its sea power and that the United States should construct a strong navy to support the expansion of American markets. Historian Frederick Jackson Turner indirectly reinforced Mahan. His noted 1893 essay—*The Frontier Thesis*—declared the final closing of the American frontier. Turner’s work implied that American economic expansion would now need to seek foreign outlets. No market lured more than the vast China market. Assistant Secretary of the Navy Theodore Roosevelt supported Mahan’s ideas and, in turn, President William McKinley’s reluctant war against Spain. By the time the dust had settled on the Spanish-American War, the U.S. sphere not only included its Caribbean possessions, but also a series of Pacific coaling stations from Hawaii to Guam and the Philippines with which to reach the fabled China market.<sup>6</sup>

Secretary of State John Hay recognized the weak position of the United States vis-à-vis the European powers which had already staked claims in China where the Americans had none. Ostensibly as a measure to safeguard Chinese rights and sovereignty, Hay proposed an “Open Door” policy to guarantee equal trade and commerce opportunities in China. He secured agreement from Japan, Russia and the European powers to this free, open market, the great powers resolving not to seize Chinese territories for the establishment of new colonies. Hay had adroitly maneuvered a relatively weaker United

States into a commercial presence in China. He did this without war and without the inconvenience of direct colonization, an important factor while the U.S. wrestled with how best to manage its new colonies, especially in the Caribbean.<sup>7</sup> Successive administrations would follow Hay's free, open market approach as a matter of foreign policy.

### **Holding Europe at Bay**

United States security interests shifted as prospects brightened for an inter-ocean canal, eventually located in Panama, driving American hegemonic interests in the region. European presence in the Caribbean needed to be minimized, either directly by naval force, or by threat of that force. Thus arose in 1904 President Roosevelt's "Big Stick," an extension of the Monroe Doctrine that came to be known as the Roosevelt Corollary. In essence, to discourage European nations from intervening in Latin America to collect debts—as had been threatened in Venezuela and the Dominican Republic—Roosevelt declared the U.S. as hemispheric policeman. These constabulary powers would not be directed so much at the Europeans, but at any irresponsible Latin American powers, in the U.S. view, that would invite European aggression for not meeting international financial obligations. As a matter of duty, the United States would take whatever measures it deemed necessary to assure internal stability in such impotent nations. In practice, Roosevelt had created justification for repeated military interventions into Latin American nations such as Cuba, Haiti, Nicaragua, and the Dominican Re-

public.<sup>8</sup>

The U.S. might desire stable Latin American nations capable of dutifully paying their debts to European investors, but civilizing mission or not, convincing American citizens to support new wars and bear the burden of more colonies would be untenable. President William Howard Taft (1909-1913) desired to replace "bullets with dollars," invoking a new foreign policy of Dollar Diplomacy. Employing private loans, typically from Wall Street, to advance U.S. overseas interests, these enhanced financial and business opportunities worked hand-in-hand with diplomatic initiatives to press for fiscal and structural reform in Latin America. Dollar Diplomacy could be employed locally in the Caribbean, or to American interests around the world. Liberia enjoyed such American attentions to promote rubber production for Harvey Firestone and his company; similarly, in China, J. P. Morgan's banking conglomerate joined forces with a European consortium to build a railroad from Huguang to Canton. Behind the scenes, the driving force behind Dollar Diplomacy proved to be none other than Philander C. Knox, founder of the giant firm U.S. Steel. This reflected the eliding of diplomacy and private commerce in a re-ordering of international relations. Despite their hopes for this new policy, it would fail to stem revolution in the Dominican Republic, Nicaragua, Mexico, and even China.<sup>9</sup>

### **Dollar Diplomacy and Imperialism**

The standard narrative does not recognize imperialism as an aspect of Dollar Diplo-



J.S. Pughe's 1900 political cartoon "Hurrah! The country is saved again!" finds Uncle Sam and Columbia dancing with new insular territories, including Cuba and "Porto Rico," as well as American Labor, Capital and the Farmer.

Photo | Library of Congress

macy. Samuel Flagg Bemis, in his classic 1940s scholarship, perceived American imperialism of the 1890's as an aberration. He explained U.S. Caribbean Basin interventions as resulting from U.S. security concerns, such as defending the Panama Canal and controlling shipping lanes. Modern scholars would challenge this, articulating that the U.S. pursued incursions in a broader historical context of establishing a Caribbean Basin empire, at least informally.<sup>10</sup>

Those differing perceptions of United States imperial designs can be somewhat resolved by considering different notions of imperialism. In the British Empire, imperialist projects invariably resulted in

colonization; however, after 1898 the United States sought to extend its influence without further acquisition of territory. Historian Daniel Headrick perceives imperialism when a stronger state imposes its will on a weaker society by force, or the threat of force. That is, in a modern sense imperialism can be equated with spheres of influence, or dominance, without the requirement for direct colonial conquest.<sup>11</sup> Imperialism aside, scholars consider Dollar Diplomacy an element of the civilizing mission. Assistant Secretary of State Francis Mairs Huntington Wilson, of the Taft administration, revealed the Social Darwinist impetus behind the policy. Wilson explained that nature's "rough method of uplift, gives sick nations strong

neighbors.”<sup>12</sup>

### **Agricultural Development in Colonial Puerto Rico**

Excitement over the new Caribbean colony washed over the American scientific community even before Roosevelt’s “Rough Riders” stormed San Juan Hill, the incorporation of Puerto Rico representing a rare American experiment in direct colonial acquisition. The technical journals communicated a variety of perspectives on Puerto Rico’s potential and how its agricultural resources ought to be developed. As medicine sought to maintain the health of the people to support the colonial project, agricultural production would provide the foodstuffs for their maintenance, and perhaps more importantly, an opportunity to sustain economic development. The journal *Science* reminded of European colonizing success, that even Holland “depended on scientific development of agriculture, forestry” and other industries in its colonies.<sup>13</sup>

Annexation after the 1898 war created opportunities to export U.S. institutional research models to Puerto Rico. President McKinley’s special commissioner, Henry K. Carroll, in his comprehensive 1899 *Report on the Island of Porto Rico*, made twenty-four specific recommendations, the final one addressing agriculture: “That an agricultural experiment station be established in Porto Rico, and that the publications of the Department of Agriculture be made available to the planters in their own language; also, that the Territory share in the Department’s distribution of seeds.”<sup>14</sup>

By 1902, the Office of Experiment Stations at the USDA established the Porto Rico Agricultural Experiment Station in Mayagüez, a city of the west coast coffee region. Historian Richard Overfield distills USDA funding arguments before Congress: “[W]herever the American flag was, residents should have the benefits of experimentation and agricultural developments.”<sup>15</sup> The USDA secretary sought hegemony over the Puerto Rican research agenda.<sup>16</sup> As the stations commenced operations, the leadership targeted projects to provide immediate assistance to growers. They focused on insect pests, for example, but their work did not synch with the actual needs of the people and initially proved of little value; the researchers had not considered previous agricultural work in Puerto Rico. Agronomist Edmundo Colón would later criticize early efforts to acclimatize North American plants as mere entertainment: “It would not have been so bad if the species from temperate climates had been tried at higher altitudes.” In addition to research, the station managed the extension service to local farmers until 1924. As with sometimes off-target research, they translated twenty-four USDA bulletins that were more suited to temperate climates than the tropics. Distributing thousands of bulletins and reports informally to leading “progressive planters,” their programs often did not reach the intended great masses of poor, local farmers.<sup>17</sup>

### **Experiment Station Successes**

The USDA Mayagüez station, however, could claim some areas of relative success. Researchers sought to stimulate the ailing



coffee industry, which had gone into decline due to the devastating effects of the recent hurricane Ciriaco, exacerbated by Spain inflicting a high tariff after 1898, thus closing the vital Spanish market to Puerto Rico. Acquiring a coffee plantation near Ponce and introducing new coffee varieties from Java, Ceylon and elsewhere, by 1911 research plots had quadrupled production over the island's average. The journal *Science* reported novel efforts by the USDA entomologist to combat the coffee leaf-miner by means of a promising parasite, and that a botanist from the Connecticut State experiment station had temporarily relocated to study coffee diseases. Scientific research, however, could not solve coffee's underlying economic problems. Americans preferred Brazilian coffee, and that South American supplier had been overproducing for some time. On the other hand, fruit farming enjoyed clear benefits from station research. As roads and port transportation improved under U.S. colonial authority, the fruit industry expanded and growers sought advice from the USDA. The station had a banana plantation and nurseries of mangoes and citrus by 1903. USDA scientists discovered that chlorosis, then affecting citrus and pineapple, was caused by excessive soil concentration of carbonate of lime; accordingly, experiments on fertilizers quickly proceeded. By 1911, fruit and pineapple exports surged to \$2.1 million, a twenty-fold leap from a decade earlier.<sup>18</sup>

The USDA station sought diversification of Puerto Rican agriculture, moving away from sugar, but that industry expanded rapidly given their exemptions from U.S.

tariffs, financed largely by North American corporations. By 1917 sugar exports had grown five-fold, eclipsing coffee as the major export.<sup>19</sup> The island had achieved an underdeveloped "colonial economy," one "heavily dependent upon the single market of the continental United States," according to historian Richard Overfield.<sup>20</sup> The sugar *centrales* had quickly planted all available land and



Loading sugar cane from ox cart to railroad car in Guánica, Puerto Rico, to be taken to the sugar mill.

Photo | Library of Congress

by that time had thus explored new cane varieties and fertilizers to increase yields. While the USDA station urged rational agriculture techniques, such as rotations with vegetable crops, the Puerto Rico Sugar Growers' Association instead formed their own private experiment station at Río Piedras in 1910, located near

the capital, San Juan. This station hoped to duplicate the private Hawaiian Sugar Producers' experiment station success in eradicating the sugarcane leafhopper, as Puerto Ricans now faced the locally damaging white grub. By 1914, the sugar producers abandoned the project in failure, donating the station to the insular government's quasi-governmental Board of Commissioners of Agriculture. The newly christened Insular Experiment Station nevertheless continued close relations with the *centrales*.<sup>21</sup>

### **Sugarcane and Disease**

The Insular Experiment Station faced a major challenge to Puerto Rican agriculture in 1917, one that would secure to it respect and reshape agricultural power relationships on the island, and beyond. Station pathologist John A. Stevenson found leaves of sugar plants oddly mottled, leading to his naming this new condition the mottling disease or *matizado*. Over the coming years the disease spread across the island, and as mills increasingly refused to accept diseased cane, bankruptcy afflicted a number of locally-owned *colonos*.<sup>22</sup>

By 1918, then director Stevenson's reports seemed desperate, with progress proving elusive. All cane varieties seemed affected, and the hereditary disease was passed down to new generations of cane grown from the diseased stalk. The disease had spread faster than planting activities alone would suggest. One small step of progress was his classification of the condition as sugar cane mosaic disease, due to its similarity to that in to-

bacco. Subsequent research determined globalization of agriculture to be the culprit, that Javanese cane hybrids arrived in the Caribbean through Argentina, perhaps via Egypt as well.<sup>23</sup>

Global scientists shifted their gaze to Puerto Rico, the disease epidemic only in that Caribbean space. The mosaic further engendered their fascination, it being a virus, one of that relatively recently discovered type of microorganisms. Investigators considered various factors that could explain the epidemic, its emergence particularly severe on smaller Puerto Rican owned plantations, *colonos*, as compared to the U.S. owned operations on the island's east and south. World War I

Never before had a Latin American nation solved a crisis in agriculture through scientific research. Puerto Rican agricultural science secured unprecedented political power throughout the Spanish Caribbean.

had essentially destroyed Europe's sugar beet industry, driving such demand for cane sugar that growers often ignored good agricultural practices. Those actions weakened plant strains, a trend exacerbated by keeping the poorer, diseased stock for seed, while sending the best for



milling. Finally, in 1920 at USDA's Maryland greenhouses, researcher E. W. Brandes discovered that the corn aphid had the ability to transmit the disease. Researchers in Puerto Rico discounted this discovery since that aphid did not feed on cane; they instead focused attention on the sugarcane leafhopper.<sup>24</sup>

### **Politics, Agriculture and Chardón**

Insular station mycologist Carlos E. Chardón would finally solve the puzzle. Born in 1898 and among the first generation of Puerto Rican scientists to come to maturity as an American colonial, he had proven a promising student at the newly established Mayagüez College of Agriculture. Chardón transferred to Cornell University upon the devastating 1918 earthquake that suspended college operations. Upon completing his master's degree in 1921, he returned to Puerto Rico to assume a station pathologist position.<sup>25</sup> Chardón conceived an elegant experiment to eliminate the leafhopper as culprit. He grew two groups of healthy cane, but one enclosed in a wire-mesh cage with leafhoppers contained therein. Within four months, the exposed cane emerged largely infected, but the enclosed group remained healthy. Chardón had exonerated leafhoppers as the culprit. He then decided to follow up on Brandes' lead regarding aphids.<sup>26</sup> Almost immediately upon his successful experiment, Chardón wrote to Nathaniel L. Britton, director of the New York Botanical Garden: "You will be interested to know that I have been able to transmit the sugar-cane mosaic by means of the [genus] aphid . . . and have obtained abundant secondary infec-

tions in the cages where the insects were used, and no infections in the checks. I forced the aphid to live on the cane by means of thorough weeding."<sup>27</sup> That is, the twenty-four year old Chardón had discovered that after normal weeding operations, the aphids jumped to cane for several hours, sufficient time to infect the plants with the mosaic virus. The aphid exposed, experts sought new resistant cane varieties, since the aphid could not be controlled. Testing canes from Java and Barbados, the new varieties flourished, producing even more sugar than before. By 1924 Puerto Rico no longer suffered under mosaic disease threat.<sup>28</sup>

Chardón viewed the increase in production as a direct result of scientific intervention. The lesson of mosaic disease was clear, that "every *colono* on the Island has awakened to the fact that after all, *only science applied to crop production* can in the end solve his problems."<sup>29</sup> Puerto Rican planters as well as politicians embraced Chardón's "vision because it had produced concrete results."<sup>30</sup> The success of the Insular Experiment Station led to its emergence as the Latin American model for agricultural science. Never before had a Latin American nation solved a crisis in agriculture through scientific research. Puerto Rican agricultural science secured unprecedented political power throughout the Spanish Caribbean and Carlos Chardón would be the vehicle to wield that power. The American governor Horace Towner found in the young pathologist a Puerto Rican from an elite family who embraced both the American and Spanish traditions, but more importantly, one who exhibited an impressive

mastery of agriculture. Taken with the insular marvel, Towner appointed Chardón as Puerto Rico's Commissioner of Agriculture.<sup>31</sup>

### Exporting Development

Theodore Roosevelt, Jr. would extol the Puerto Rican agricultural commissioner Chardón in the pages of *Foreign Affairs* as having "done investigational and scien-



Cornell-educated biologist Carlos E. Chardón, former insular agricultural commissioner, in 1931 serving as chancellor of the University of Puerto Rico.

tific work of the first value."<sup>32</sup> Former University of Puerto Rico chancellor Thomas E. Benner, also writing in early 1930s issues of *Foreign Affairs*, elaborated on the eminent scientist: "The services of Porto Rico's commissioner of agriculture, Carlos A. [sic] Chardón, have been loaned on request to the ministries of agriculture of several Latin-American countries; on the basis of his study and advice new programs of teaching and experimentation have been inaugurated in the republics visited."<sup>33</sup>

Late in the previous decade of the 1920s, the new agricultural commissioner had hoped to promote the best aspects of North American and Puerto Rican traditions, perceiving his mission to export U.S. scientific knowledge to meet the agricultural, economic, social and political needs of Latin America. He argued that export agricultural problems were biological: soil depletion, crop diseases and declining yields. Scientists had the requisite expertise to solve these challenges. In short, the masters of biological practice should drive agricultural policy, not only in Puerto Rico, but throughout larger Latin America.<sup>34</sup>

Latin America marveled at and sought to emulate Puerto Rico's agricultural success. As a result, Chardón consulted extensively with governments and agricultural groups in Cuba, Colombia, Venezuela, Panama, Peru, Ecuador and the Pan American Union. He focused on two projects: constructing a national agricultural research program in Colombia, and establishing Puerto Rico's graduate school of tropical agriculture.<sup>35</sup> These efforts fit squarely within Roosevelt's vision. The governor proclaimed the work of Chardón and others: "In agriculture Puerto Rico's achievements have been the equal of those in medicine." Roosevelt sought to build on those achievements, arguing that for North and South America, Puerto Rico "can serve as the connecting link between the two great cultural divisions." That is, "We might well make Puerto Rico a base for cultural and scientific work the influence of which would be felt through both continents."<sup>36</sup>

## **The Graduate School of Tropical Agriculture**

Chardón's work in Puerto Rico and Colombia convinced him of the need for a graduate school of tropical agriculture to train the future specialists that would surely be in great demand. He accelerated efforts in this area and, by 1926, developed a detailed proposal. The United States, he felt, had a moral obligation to train these future agricultural leaders; moreover, such a biologically-oriented Latin outreach could be more constructive than, as he sardonically noted, the military's clear failure "in the development of friendly relations with Haiti, Santo Domingo, and Nicaragua."<sup>37</sup> Chardón referred to a series of military interventions after the failure of Dollar Diplomacy in those nations.

The model for this new agricultural graduate school would be the University of Puerto Rico's highly successful School of Tropical Medicine.<sup>38</sup> Just as Columbia University filled a critical cooperative role for that medical institution, he imagined Cornell University likewise providing similar support for agriculture. By the following year, Chardón led a high-level Puerto Rican delegation to Washington to place the proposal before the National Research Council's chair for the Committee on Biology and Agriculture. The NRC visited Puerto Rico and embraced the project, declaring that the proposed university would promote Western hemispheric relations. The Puerto Rican legislature authorized the school and Cornell's president committed to raising funds for the institution.<sup>39</sup> The journal *Science*, nearly

two decades earlier, had called for a "Pan-American institution for the scientific study of the conditions of tropical America."<sup>40</sup> This seemed to be coming to fruition with Chardón's initiative, *Science* now declaring that assistance along "scientific lines" could promote international relations. "For that reason, Governor Roosevelt hopes that the graduate tropic agricultural school on the island sponsored by Cornell University may soon become a reality."<sup>41</sup>

The economic effects of the Great Depression impacted agricultural science in Puerto Rico. While the USDA station stood immune to local conditions, and the Insular Experiment Station managed to attract legislative funding, progress on the School of Tropical Agriculture ground to a halt. The president of Cornell University proved unable to secure sufficient donors for the needed \$1 million endowment.<sup>42</sup> As a result, Chardón adjusted his trajectory, accepting the chancellorship (rector) of the University of Puerto Rico.<sup>43</sup>

Chardón's experiences with the economic depression and in managing a university broadened his views on the primacy of scientific research as the vehicle for modernization; he now came to appreciate more fully the study of economics as a complementary consideration. Appointed to the Puerto Rico Policy Commission, he prepared a report regarding the island's economic situation. As foreign sugar markets contracted and poverty increased, the chancellor and his colleagues developed a reform plan—the *Plan Chardón*—to diversify agriculture as well as industry. Tech-

nological recommendations, such as developing alcohol fuels from sugar, joined with economic proposals. The plan having been endorsed by Franklin D. Roosevelt's administration, Chardón resigned as chancellor to assume leadership of the Puerto Rican Reconstruction Agency (PRRA), a New Deal organization. The PRRA worked to rebuild the fruit and coffee sectors, while also addressing soil erosion and deforestation, against a backdrop of political resistance from the powerful sugar corporations.<sup>44</sup> Though PRRA success proved elusive, USDA undersecretary (and future Puerto Rican governor) Rexford Tugwell endorsed the *Plan Chardón* and urged the Mayagüez experiment station to expand its mission beyond Puerto Rico in order to serve the broader continental United States as well.<sup>45</sup>

### **SDIC and the Dominican Republic**

Nearly a decade prior to the annexation of Puerto Rico, Gilded Age speculators Smith M. Weed and Frederick Williams Holls—friends of President Glover Cleveland—formed the San Domingo Improvement Company (SDIC) in order to seek their Caribbean fortunes. SDIC's first action: Purchase of the Dominican Republic's five-million-dollar debt in 1893 from the Dutch. Allying with Dominican dictator Ulises Heureaux, the SDIC sought to improve the nation's finances in order to pay off the debt. Through the dictator, the SDIC pressed country peasants, the *campesinos*, to abandon food crops in favor of export agriculture, as would later occur under American tutelage in Puerto Rico and Cuba. Such a

shift would not only provide greater agricultural exports but would also increase food and manufactured imports from the U.S., with duties levied by Heureaux both ways to enhance his nation's financial solvency. This nascent Dollar Diplomacy would eventually prove unworkable against fierce peasant resistance. Heureaux's assassination would force the U.S. to take direct control in 1905, permanently sidelining the pariah SDIC. In the end, the SDIC catalyzed President Theodore Roosevelt's Corollary to the Monroe Doctrine, and led the way for the mature Dollar Diplomacy to take root, being financed from major bankers, as opposed to management by a Gilded Age relic, an SDIC run more on cronyism than capital.<sup>46</sup>

Washington, in the early 1890s, had originally embraced the SDIC in order to expunge European influence from the Dominican Republic. As long as European bankers owned the loans there, they exercised a level of control that flew in the face of the Monroe Doctrine's spirit. Much better, Washington reasoned, for a private American firm to own the debt. Americans running the SDIC could also help maintain close ties to the Dominican Republic as the U.S. negotiated for rights to Samana Bay. The U.S. needed this as a coaling station for Mahan's new navy, especially with the Central American isthmus canal to the Pacific already under construction, though at the time in Nicaragua rather than Panama. The U.S. wanted to control the anticipated lucrative traffic that would flow near the island of Hispaniola, and have a military presence to help protect the canal. Outposts in

Puerto Rico and Cuba's Guantanamo Bay yet lie some years into the future.<sup>47</sup>

The roots of the SDIC's demise lie within its structure. With its financial capital sources in Europe and its political power in Washington, the SDIC embodied a contradiction. Once the Dominican Republic defaulted on its loans in 1897 an international scramble occurred during the 1901-1904 period, leading to the U.S. invasion. That is, one might ignore the suffering caused to the Dominican people that the SDIC-induced restructuring had engendered, but Washington could not countenance European interventions to secure their principle and interest. In fact, Washington realized, a bit tardily, that it had allowed a private firm to preempt and usurp diplomatic channels for some years. Roosevelt would remove that middle-man with his beginnings of Dollar Diplomacy. The U.S. thus established the 1905 receivership of Dominican customs, directly managing the flow of money on behalf of the inept and most likely corrupt Dominicans. The *modus vivendi* applied 55% of customs receipts against debt payments. Seizing these income streams would prevent revolutionaries from doing so to support insurrection. The president arranged for New York banks to refinance SDIC debts as well as those owed to European creditors. The United States had now established a "fiscal protectorate" over a small Caribbean nation in addition to its own colony of Puerto Rico.<sup>48</sup>

## **Receivership to Dominican Intervention**

The *modus vivendi* operated for over two years before the Senate ratified its provisions as a treaty in 1907. The Dominican Republic, during that time, successfully restructured its debt down to a \$20 million bond issued in the United States, which also supported needed public works. American direct investment soared as business interests noted the new Dominican Republic, one now paying its bills. This investment included American sugar firms, now benefiting under tariff and tax incentives codified in the 1911 Agricultural Concessions Law. The island enjoyed financial and political stability for a handful of years afterwards until a new series of revolutionary disruptions threatened.<sup>49</sup>

Newly elected President Woodrow Wilson, successor to Roosevelt's hand-picked Taft, inherited the Dominican challenge and vigorously faced new political instabilities there. The U.S. refused to accept a new revolutionary regime in 1913, and forced new elections that December. American pressure for increased financial control provoked resistance so that by 1916 former Minister of War Desiderio Arias took over the city of Santo Domingo in an attempted coup. To prevent Arias from assuming control of the government, President Wilson established a full U.S. military occupation of the Dominican Republic on November 26. Abrogation of the 1907 treaty and refusal of Dominicans to reform in order to meet international financial obligations stood as the primary reasons for the U.S. action,

but as the Great War approached, fear of German infiltration into the Dominican Republic also fueled American concerns.<sup>50</sup>

The U.S. military governed the Dominican Republic for an eight year period (1916-1924). Modest achievements could be claimed related to island reforms, but they hardly matched the extraordinary efforts made by U.S. military authorities in such areas as sanitation, education, property rights, taxation and agriculture. Agricultural reforms, in particular, followed a “technocratic progressive” orientation, including establishing extensive experimentation stations with which to integrate colonial knowledge from American experts who had served in the Philippines, Cuba and Puerto Rico.<sup>51</sup> Environmental historian Stuart McCook observes that “The fusion of Cuban, Puerto Rican, U.S., and foreign influences made the research stations distinctively creole institutions.”<sup>52</sup> More specifically, the American dean of the College of Agriculture and Mechanic Arts (Mayagüez, Puerto Rico), which had been in operation since 1911, quickly engaged in correspondence with Holger Johansen, an American agronomist and the Dominican Republic’s new agricultural director. Johansen, who would later lead research in the Panama Canal Zone (as well as 1930s sugarcane investigations in Puerto Rico) sent some of his students to Puerto Rico to become agricultural experts, while the Puerto Rican college provided graduates to work on Dominican projects.<sup>53</sup> Linkages continued after the occupation, with Puerto Rican agricultural commissioner Carlos Chardón working with the Dominican

president in 1937 on an economic development plan, which included forestry management. In fact, during the 1940s Chardón would head the National Agricultural Institute of the Dominican Republic.<sup>54</sup>

### **Peasants and Guerrillas**

Agricultural reforms, however, proved impossible in the eastern sugar provinces, where a violent guerrilla movement emerged in response to the occupation. The shift from subsistence agriculture to export monoculture, as demanded by the dollar diplomats, resulted in peasants losing land to the American-owned sugar operatives. Unemployed and landless, these peasants joined the guerrilla resistance. The little-reported war against the U.S. Marines found exasperated American occupation forces resorting to cruelty and even torture against the peasant fighters. This only strengthened local resistance. Ironically, the Americans could offer emerging tropical agricultural expertise, but unfortunately the Dominicans would not benefit greatly from it. American occupying forces would experience similar frustration with insurgents nearly a century later during nation-building enterprises in Iraq and Afghanistan.<sup>55</sup>

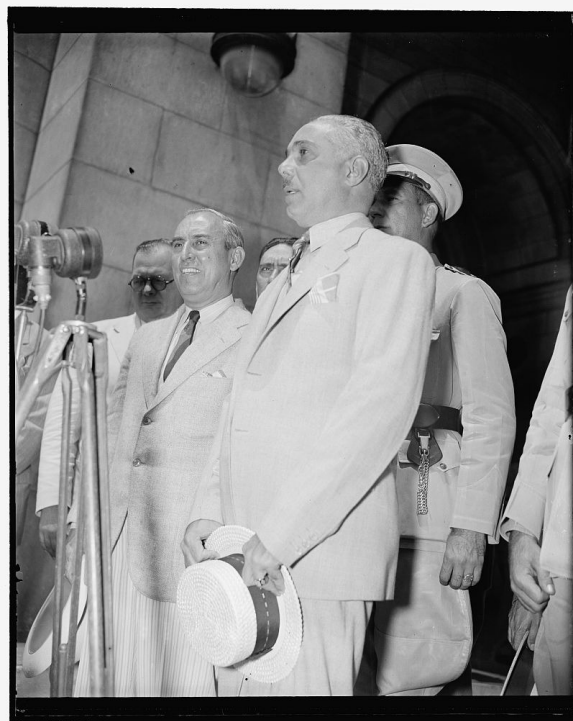
Unintended consequences resulted from the Dominican adventure. Armed guerrilla resistance in the east reinforced mounting political pressure against the U.S. occupation. The negotiations over the eventual withdrawal in 1924 catalyzed a rising nationalism in the nation. At the same time, in attempting to prevent a return to disorder, Americans had created a



strong local police force, the *Guardia Nacional*. Its commander, Rafael Trujillo, unexpectedly manipulated the forces at his command to steal the election of 1930, establishing himself as dictator. President Trujillo sought legitimacy, but his pariah regime carried only disfavor and resistance from the U.S. State Department. The advent of World War II reversed the legitimacy equation. Trujillo effectively postured as an anti-Hitler protector of America's Caribbean backdoor. The U.S. military swung to his side, strongly supporting the regime. So successful Trujillo's exploitation, President Franklin Delano Roosevelt would look beyond a large-scale genocide of Haitians, instead touting the dictator's munificence in welcoming Hitler's displaced Jewish refugees. Dollar Diplomacy had enabled conditions for America's creation of a ruthless Caribbean strongman, a pattern that would occur again and again; moreover, Americans would then be manipulated by their monsters from the Caribbean laboratory, in this case against Hitler, later by other despots against American fears of Communism or Middle Eastern extremism.<sup>56</sup>

### **Taft and Dollar Diplomacy**

William Howard Taft assumed the presidency from his political ally Theodore Roosevelt in 1909, differing from his predecessor in placing greater importance on foreign trade than expansionism. Taft realized the United States economy produced more goods than it could consume and that foreign markets in Latin America and China needed to be vigorously pursued for export. He believed that strengthening the economies of those re-



Dominican Republic strongman General Rafael Trujillo, standing at attention, upon arrival in Washington, while the national anthem is played (1939).

Photo | Library of Congress

cipient nations would not only make them good consumers of American products, but would improve political stability overseas. Taft and his Secretary of State Knox found Roosevelt's Dominican precedent of establishing customs receiverships appealing, and as part of their Taft-Knox doctrine, they resolved to apply this solution to other nations. Taft thus formalized Roosevelt's original *modus vivendi* into the doctrine of Dollar Diplomacy, which came to be associated with Taft more than any other president. In fact, during his last address to Congress on 3 December 1912, President Taft summarized his foreign policy as one concerned with commercial intercourse: "This policy has been characterized as substituting dollars for bullets. It is one



President William H. Taft, promoter of U.S. Dollar Diplomacy policy, in 1912 portrait.

Photo | Library of Congress

that appeals alike to idealistic humanitarian sentiments, to the dictates of sound policy and strategy, and to legitimate commercial aims.”<sup>57</sup>

Taft attempted Dollar Diplomacy not only in the Caribbean, but also around the world in places like China, Turkey and Liberia. The Chinese experience proved controversial and unsatisfactory. Whereas Roosevelt had supported Japan as the emerging power of Asia, and a potential bulwark against Russian expansion, which in turn could also help to protect Hay's Open Door, Taft and Knox reversed that policy in favor of China. America must increase its financial interests in China, for surely that nation would take the lead in Asia. Taft's administration irritated Europeans as the president insisted

American investors participate in Yangtze Valley railroad initiatives. One such project in Manchuria—to repurchase the Chinese Eastern Railroad from Russia—only resulted in binding the formerly antagonistic Japanese, Russians and Europeans into an alliance to shut out the Americans. That is, U.S. efforts to strengthen China's hand actually put the Qing Dynasty in a weaker position against the now strongly united foreign powers. Other potential Dollar Diplomacy schemes in the Middle Kingdom came to a grinding halt with the Chinese revolution of 1911, establishing the Republic of China. President Woodrow Wilson would reluctantly support further loans to China in 1918, but Dollar Diplomacy failed to elevate that nation. Japan remained dominant in Asia until World War II, much as Roosevelt had predicted.<sup>58</sup>

It can be argued that Taft's Dollar Diplomacy did anticipate future American foreign policy. President Taft used private capital to foster development overseas, but after World War II President Harry S. Truman chose public capital to the same end. Both presidents sought to advance American interests by establishing stable governments in underdeveloped nations.<sup>59</sup>

### **Nicaragua and U.S. Imperial Rule**

Dollar Diplomacy had been an utter failure in Asia, but at least Taft could claim mixed results in Latin America. Factors associated with the Panama Canal emerged as the overriding factor in Caribbean affairs, and no other nation found itself more impacted by this than Nicara-

gua. Once the U.S. decided in favor of Panama for the canal, thus abandoning the project in Nicaragua, the issue of European intervention took on a new complexion. The Americans could not accept a rival canal in Nicaragua, and President José Santos Zelaya's efforts to do just that with the Germans (and Japanese) required reigning in the recalcitrant leader. The outbreak of civil war at the east coast town of Bluefields in October, 1909 pushed the United States into action. American money had financed the revolutionaries, in part, and when Zelaya executed two American mercenaries that had been captured with the rebels, the U.S. broke off diplomatic relations. Marines quickly landed at Bluefields to protect American property. Zelaya resigned to Mexican exile by December.<sup>60</sup>

The revolutionaries assumed power within a year, but the U.S. would not recognize Adolfo Díaz's conservative government until he had accepted an American receivership of customhouses and a new American loan to pay off British bankers. Unlike the Dominican Republic, the U.S. did not directly take over the government, but sent in an army of dollar diplomats to reform the Nicaraguan economy.<sup>61</sup> The American hegemony of this policy could not be more evident, with the Banco Nacional de Nicaragua organized as a Connecticut institution, and that nation's railroad (Ferrocarril del Pacífico) established as a Maine Corporation.<sup>62</sup>

Revolution erupted once again in 1912, resulting in another American intervention with 2,700 Marines to protect U.S.

property and citizens. Soon the U.S. withdrew the majority of its Marines, but maintained a contingent almost continuously over the next two decades, until 1933, as a demonstrative force to help sustain conservative rule. While the Senate would not approve the Castrillo-Knox Treaty to affirm U.S. rights to military in-

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tervention, by 1916 it did ratify the modified Chamorro-Bryan Treaty granting the U.S. exclusive rights for construction of an interoceanic canal in Nicaragua. This served American interests in preventing a rival canal to challenge the then-completed Panama Canal.<sup>63</sup>

Dollar Diplomacy in Nicaragua took on a different stance than in other parts of Latin America. Wall Street policymakers sought to prevent corrupt elites from politicizing public finances, at least in the U.S. view. American bankers assumed control of the treasury, their restrictive policies depriving Nicaragua of the "dance of the millions" that characterized Dollar Diplomacy elsewhere in Latin America. The paradoxical U.S. position against modernization, at least according

to the elite plantation owners from Granada, the region of the powerful, conservative oligarchical coffee and sugar growers, even came to be reflected in popular Nicaraguan novels. The plot lines revealed the villains as Wall Street bankers, the victims as local agro-export producers. The crime: Ruination and bankruptcy of the nation's agricultural enterprises by withholding credit and refusing to support development of transportation infrastructure, such as railroads. The United States had managed to convert its conservative, elite supporters into anti-Americans, virtually ready to support a new revolution. Further demonstrating Nicaraguan chafing under American strictures, President Bartolomé Martínez nationalized the U.S.-controlled Banco Nacional, a move to which the State Department acquiesced, over bitter Wall Street denunciations.<sup>64</sup>

### **The Nicaraguan Legacy of Unintended Consequences**

The scholar Michel Gobat explicates the unintended democratizing consequences of Dollar Diplomacy in Nicaragua. While true that capital-intensive oligarchical agricultural interests suffered, in fact Nicaraguan agricultural-based economic growth accelerated under U.S. control through its withdrawal in 1933. Coffee, sugar and banana exports actually grew, but the greatest strength proved traditional agriculture, particularly cattle and cereal production that brought in several-fold more revenue than the plantation sectors. Lack of rail and other transportation development, so negatively impacted by Wall Street's restrictive policies to en-

courage paying off debt instead of financing political patronage projects, little affected the non-elite agricultural producers. Utilizing existing waterways and land



Graffiti pronouncement of "No more dictatorship" in Granada, Nicaragua.

routes, they exported corn and cattle to other Central American nations, ironically countries benefiting from Wall Street investment. The elites suffered disproportionately from the lack of credit to support modernization, with non-elite small and medium growers enjoying the democratizing effect, that is, finding local credit sources more than satisfactory for their more modest needs.<sup>65</sup>

The American withdrawal in 1933 had a similar unintended consequence as in the Dominican Republic. Various governmental factions threatened almost continuously, but the nationalist leader Augusto César Sandino actually raised a peasant army to resist the Americans. The United States had created a *Guardia Nacional* to maintain order after departure, but Sandino insisted it represented American imperialism and must be dissolved. The Nicaraguan president had placed the *Guardia Nacional* under a fellow conservative, Anastasio Somoza García,

who refused the request to dissolve the military, his power base. Somoza instead secretly had Sandino arrested and executed in 1934, and within a month had hunted down and exterminated the liberal army. Somoza resigned from the *Guardia Nacional* long enough to be constitutionally elected president in 1936, only to resume his position as military chief the following year. The laboratory of American Dollar Diplomacy had created yet another Latin American tyrant. The autocratic dictatorship of Anastasio Somoza lasted over four decades until challenged by the Sandinista rebels, liberals who claimed Sandino's heritage, but who were perceived and resisted as Communists by American presidents Carter and Reagan. Remnants of Somoza's army would be reconstituted as the Contras, and despite (illegal) arms deals with the Iranians to fund these "freedom fighters," the Sandinistas would remain in power.<sup>66</sup>

### **Lessons of Dollar Diplomacy**

New York University historian Greg Grandin, a Guggenheim fellow and member of the United Nations Truth Commission investigating the Guatemalan Civil War, argues that Latin America has been the proving ground for exporting American diplomacy around the world. Grandin acknowledges that recent American efforts to assist developing nations are perceived to be a continuation of similar post-World War II assistance to Germany and Japan; however, according to Grandin, this is all wrong. America's first attempts to restructure nations occurred much earlier in places like Cuba. The modern U.S. military formed in re-

sponse to Latin America, the command structure of the Joint Chiefs of Staff established just after the Spanish-American War; furthermore, in Nicaragua the military first perfected the coordination of aviation assaults with ground troops, and Latin American guerrilla wars served to hone soldiers' capabilities in preparation for European and Asian conflicts. Grandin reminds that by 1933 Americans invaded Caribbean nations at least thirty-four times, but also stresses that Latin America proved to be the indispensable school of foreign policy officials. This is where they learned "soft power," to use nonmilitary means in spreading American influence via cultural exchange, multilateral cooperation and commerce. President Franklin Delano Roosevelt launched European and Asian diplomatic initiatives based upon the success of his Good Neighbor policy in Latin America.<sup>67</sup>

The long reach of Dollar Diplomacy in the locations discussed—Puerto Rico, the Dominican Republic and Nicaragua—tends to support Grandin's conclusions. That is, American efforts to promote peace, development and stability faced tensions originating from local agency, global realpolitik, and unintended consequences. Some lessons that might be gleaned from these examples:

- 1) While Presidents Roosevelt, Taft and Wilson sought to shut out European influences in the Caribbean via Dollar Diplomacy, in the end the exhaustion of World War I shifted European attention away from the Western hemisphere, not American policy. Similarly, in the Cold War the United States strenuously sup-

ported anti-Communist positions and even wars in Central America, at severe human cost, only to learn the Soviets had not orchestrated liberal and socialist-leaning movements to the extent imagined.<sup>68</sup> What factors are overlooked or overestimated in the United States today in relation to Asia, the Middle East and in modern Latin America?

2) The creation of local police and military forces as a surrogate for American power, with the hope of maintaining order and stability, will likely be counterproductive. The National Guards in both the Dominican Republic and Nicaragua proved alluring tools for would-be despots, enabling ruthless autocratic regimes to emerge and terrorize local populations. The result in such cases is often much worse than the original problem of instability, presenting even greater threats to peace and development. This pattern may be emerging in Iraq with local police forces, based on numerous reports of local abuse.

3) The chicanery of the SDIC in the Dominican Republic drew the United States into significant new roles in Latin America, that is, establishing a customs receivership and attempting to grow a foreign economy. Similarly, after World War II, the United States assumed a greater responsibility on a global scale, and more recently 9/11 changed the U.S. role yet again. History suggests that today's reality may only be a chimera requiring rapid adjustment to a new paradigm at any time.

4) Globalization, knowledge production and development are intrinsically related,

as demonstrated in colonial Puerto Rico. Globalized sugar cane mosaic disease traveled from Java through Argentina and possibly Egypt before creating an international sensation in Puerto Rico. More recently, AIDS and other modern human diseases also erupted rapidly on a global basis due to modern transportation networks. In terms of knowledge, as imperial powers interact with client nations they often disparage local knowledge. This sometimes has negative effects, as with the initially ill-conceived export of American agricultural practice to Puerto Rico. At the same time, local knowledge may be embraced, Carlos Chardón's research success against sugar cane mosaic disease serving as an example; however, efforts to globalize Chardón's agricultural expertise to broader Latin America failed due to differing cultural practices and local conditions.

5) Democratizing forces, the benevolent goal of American imperialism, can have unintended, negative consequences. In Nicaragua, such democratizing influences weakened the elite, eliciting a counter-reaction that ultimately helped destabilize the nation into revolution and then a despotic regime. As the United States interacts in complex world areas such as the Middle East and Asia that possess a diverse number of stakeholders, it is critical to have an advance understanding of the interests, power relationships and vulnerabilities of those groups.

6) The eight year Dominican military intervention of 1916-1924 found Americans industriously working to improve education, infrastructure and institutions,



only to encounter fierce resistance and to discover upon withdrawal that their strongest legacy had been to breed anti-American nationalism. Occupation, however it might be justified and whether or not in the interest of the “host” nation, can be expected to unite indigenous peoples, coalescing their unity into resistance. While one may differentiate between religious and colonial experiences in Latin America and the Middle East—and debate notions of nationalism in those regions—the Dominican experience could nevertheless have helped to predict the insurgency the Americans experienced in Iraq.

7) Alliances with regional leaders expose the United States to potential manipulation. Dominican strongman Rafael Trujillo exploited American fears of Adolf Hitler, while Anastasio Somoza exaggerated the Communist menace to advance his own agenda.<sup>69</sup> In the twenty-first century, the United States needs to understand the intentions of allies such as Pakistan and Israel as it continues the fight against Middle Eastern extremism.

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